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Appointment Management

Introduction

The Edit Classification action permits you to edit required classifications associated with regular appointments and stand-alone add/edits. The classifications include those questions related to whether or not the treatment was for a service connected condition, or related to Agent Orange/ionizing radiation/environmental contaminant exposure or Military Sexual Trauma (MST). These questions appear if they are applicable to the patient.

All required classifications must be answered to complete the checkout process. You are not allowed to up-arrow out of these questions unless they are already answered or your site has set the ALLOW '^' OUT OF CLASS. parameter in the Set up a Clinic option (Supervisor menu) to YES.

You may now make primary care team and position assignments/unassignments through this option. You may notice the term “ambiguous data” in relationship to primary care information. “Ambiguous data” means that an inconsistency has occurred. It can be displayed for the primary care provider, associate provider, and team fields.

Appointment Management

Example

Select Patient name or Clinic name: **HANSEN,H**

Searching for a Patient HANSEN,H 02-03-71 123450101 YES NSC
VETERAN

| | | |
|---------------------------|------------------------|------------------------------|
| Appt Mgt Module | Jul 30, 1997 09:10:12 | Page: 1 of 1 |
| Patient: HANSEN,H (0101) | | Outpatient |
| PC Prov: SMITH, NEIL | Assoc Prov: Jones,Gary | Team: [ambiguous data] |
| Total Appointment Profile | | 06/30/97 thru 04/24/00 |
| Clinic | Appt Date/Time | Status |
| 1 Ultrasound | Jul 29, 1997 10:30 | Action Req/Checked Out 08:03 |
| 2 Ultrasound | Jul 29, 1997 15:30 | Cancelled By Patient & |
| 3 X-ray | Jul 30, 1997 09:00 | No Action Taken/Today |
| 4 Ultrasound | Aug 11, 1997 08:00 | Future |

Enter ?? for more actions

| | | |
|------------------------------------|--------------------------|-----------------------------|
| CI Check In | CL Change Clinic | PR Provider Update |
| UN Unscheduled Visit | CD Change Date Range | DX Diagnosis Update |
| MA Make Appointment | EP Expand Entry | DE Delete Check Out |
| CA Cancel Appointment | AE Add/Edit | CP Procedure Update |
| NS No Show | RT Record Tracking | PC PC Assign or Unassign |
| DC Discharge Clinic | PD Patient Demographics | TI Display Team Information |
| AL Appointment Lists | CO Check Out | |
| PT Change Patient | EC Edit Classification | |
| Select Action: Quit// TI | Display Team Information | |
| Select Appointment (1-4): 1 | | |

Team Information Jul 30, 1997 09:10:12 Page: 1 of 1

Patient: HANSEN,H (0101) SSN: 123450101
*** Team Information ***

| | |
|---------------------------------|-------------------------------|
| Primary Care Team: BLUE | Phone: 733 -0000 |
| Primary Care Team: RED | Phone: 733 -1234 |
| PC Provider: SMITH,NEIL | Position: PHYSICIAN - PRIMARY |
| Associate Provider: JONES, GARY | Position: PHYSICIAN ASSISTANT |

Enter ?? for more actions

Select Action: Quit// **<RET>**

Primary Care Team/Posn Assign or Unassign

Introduction

This option is used to assign patients to and discharge patients from PCMM teams and associated positions for primary care assignments. At any given time, a patient may only be assigned to one primary care team and one primary care practitioner.

Only active teams and practitioners are available for selection. PCMM Business rules relating to the Restrict Consults and Assignment Date features shall be followed in this option.

Once the patient name is entered, the software checks to see if the patient already has primary care assignments. Based on that status, the option displays the applicable prompts to accomplish the following actions.

- Assign patient to Primary Care team.
- Assign patient to PC practitioner position. You can look-up by either position name or the current practitioner assigned to the position.
- Unassign from team. If a patient is assigned to a PC position, both the PC position and PC team will be unassigned. If the patient is assigned to a non-PC position, the PCMM GUI interface must be used.
- Unassign from position. If the patient is unassigned from the PC practitioner position and has other position assignments on the team, you are given the opportunity to unassign from those positions. If you do not unassign from all positions, the team unassignment will not be made.

While assigning/unassigning from a position, if the position has an associated clinic, the user will be prompted to enroll/discharge the patient from that associated clinic.

MailMan messages are generated as a result of the actions taken while utilizing this option.

You must hold the SC PCMM ROLL security key to access this option.

Primary Care Team/Posn Assign or Unassign

Example

Select Appointment Menu Option: **Primary Care** Team/Posn Assign or Unassign
Primary Care Team/PC Assignment/Unassignment

Prior to using this option, PCMM's Graphical User Interface (GUI) must be used to:

- 1) Setup active primary care team(s)
- 2) Setup active PC Practitioner position(s)
- 3) Setup any necessary preceptor/preceptee relationships
- 4) Assign practitioner to position(s)

A patient can only have one PC team and one PC Position assignment on a given day. The patient must be assigned to a position's team to be assigned to the position.

Note: You must use the PCMM GUI if the patient was:

- o unassigned from PC assignment today or in the future
- o assigned to a future PC assignment.

Select PATIENT NAME: **CALDWELL,JAMES** 11-10-14 065017747 YES SC VETERAN
Checking PC Team and Position Status...

No current PC Team/PC Practitioner Assignments

About to Assign CALDWELL,JAMES to a primary care team

Select TEAM NAME: **GREEN**

Assignment date: TODAY// **<RET>** (JUL 27, 1998)

Are you sure (Yes/No)? **YES**

Sending NEW Patient-Team Assignment Message

Choose way to select PC POSITION Assignment:

Select one of the following:

- | | |
|---|----------------------------|
| 0 | NONE |
| 1 | BY PRACTITIONER ASSIGNMENT |
| 2 | BY POSITION ASSIGNMENT |

Enter response: 1// **2** BY POSITION ASSIGNMENT

About to Assign CALDWELL,JAMES to PC Position Assignment

POSITION's Name: **PHYSICIAN** GREEN KILMADE,MARK

Assignment date: JUL 27,1998// **<RET>** (JUL 27, 1998)

Are you sure (Yes/No)? **YES**

Position Assignment made

Team Assignment made

Primary Care Team/Posn Assign or Unassign

Example

MailMan Message

Subj: NEW PATIENT-TEAM ASSIGNMENT for Patient (C7747) [#68729]
07 Aug 98 07:09 11 Lines
From: BAILEY,CURTIS in 'IN' basket. Page 1

Current Patient Team Data:

=====

PATIENT: CALDWELL,JAMES
TEAM ASSIGNED DATE: AUG 07, 1998
TEAM ASSIGNMENT: GREEN
ASSIGNMENT TYPE: PRIMARY CARE
USER ENTERING: BAILEY,CURTIS
DATE/TIME ENTERED: AUG 07, 1998@07:09:16

Current Primary Care Management Data:

PC Team: GREEN Phone: 990 -3355

Select MESSAGE Action: IGNORE (in IN basket)//

Section 3 - Outputs Menu

The Outputs menu provides the capability to produce a variety of reports and letters pertinent to Scheduling procedures. The following is a brief description of the outputs included in this section.

APPOINTMENT LIST

This option is used to generate appointment lists for one/many/all clinics for a specified date.

APPOINTMENT MANAGEMENT REPORT

This option is used to print appointment lists that will help the site implement and manage the new appointment check in requirement.

CLINIC ASSIGNMENT LISTING

This option is used to monitor the size and composition of clinics. Over time, the listings can reflect clinic growth, shrinkage, etc.

CLINIC LIST (DAY OF WEEK)

This option is used to generate a listing of all active clinics showing which days they meet and, if applicable, the days they will meet in the future.

CLINIC NEXT AVAILABLE APPT. MONITORING REPORT

This option provides an appointment monitoring tool which reflects the data collected for the access performance measure.

CLINIC PROFILE

This option is used to produce a profile of one/many/all clinics.

DISPLAY CLINIC AVAILABILITY REPORT

This option is used to provide a display of the clinic patterns for the clinics and date range selected. For each selected clinic, the option will print its clinic appointment pattern as well as a listing by appointment date/time of those patients who are scheduled.

ENROLLMENTS > X DAYS

This option is used to produce a report showing all enrollments for a selected clinic which exceed a select number of days.

FILE ROOM LIST

This option is used to generate a list of appointments for a specified day.

FUTURE APPOINTMENTS FOR INPATIENTS

This option is used to produce a report that lists all patients admitted on a particular date that have pending appointments at the facility.

INPATIENT APPOINTMENT LIST

This option is used to produce a list of inpatients who have appointments scheduled for the facility's clinics.

MANAGEMENT REPORT FOR AMBULATORY PROCEDURES

This option is used to print a statistical report of ambulatory procedures captured through the CPT coding of outpatient visits for a specified date range.

NO-SHOW REPORT

This option is used to generate a report of all no-shows entered into the system for specified clinics.

PATIENT PROFILE MAS

This option is used to generate a profile for a selected patient including demographic, clinic, eligibility and Means Test information.

PCMM REPORTS

DETAILED PATIENT ASSIGNMENTS

This option generates a report which lists patients assigned to selected teams and selected clinics. The report may be used prior to team/position assignments in order to help validate clinic enrollments.

HISTORICAL ASSIGNMENT REPORTS

HISTORICAL PATIENT ASSIGNMENT DETAIL

This option is used for printing all provider, position, and team assignments that exist for a patient during a specified date range.

HISTORICAL PROVIDER POSITION ASSIGNMENT LISTING

This option is used for printing provider position assignments that exist during a specified date range.

HISTORICAL PATIENT POSITION ASSIGNMENT LISTING

This option is used for printing patient position assignments that exist during a specified date range.

HISTORICAL TEAM ASSIGNMENT SUMMARY

This option is used for printing counts of team and team position assignments and unique patients within a specified date range.

PCMM INCONSISTENCY REPORT

This option is used to print the inconsistencies that may exist as a result of the new business rules that were established in Phase II of PCMM.

INDIVIDUAL TEAM PROFILE

This option generates a report which displays basic team definition information for selected teams.

PATIENT LISTING FOR TEAM ASSIGNMENTS

This option generates a report which lists patients assigned to the selected teams.

PRACTITIONER DEMOGRAPHICS

This option generates a report which displays information for an individual practitioner.

PRACTITIONER'S PATIENTS

This option generates a report which displays information pertaining to the number of patients and names of patients assigned to selected practitioners on selected teams.

SUMMARY LISTING OF TEAMS

This option generates a report which displays the number of patients assigned to each practitioner currently assigned to the selected team who is in a position that has one of the selected roles.

TEAM MEMBER LISTING

This option generates a report which displays information on selected teams and their members.

TEAM PATIENT LISTING

This option generates a report which displays information on selected teams and their patients.

PRINT SCHEDULING LETTERS

This option is used to print any one of the following types of scheduling letters for a selected date range: Appointment Cancelled, Clinic Cancelled, No-Show or Pre-Appointment.

PROVIDER/DIAGNOSIS REPORT

This option is used to print a report of outpatient encounters for a selected date range sorting by Division and Outpatient Encounter Date. You also may choose two of the following additional sorts: Provider, Diagnosis, Patient, Clinic, or Stop Code.

RADIOLOGY PULL LIST

This option is used to generate a listing of all patients whose radiology reports/films are required for their scheduled appointments.

ROUTING SLIPS

This option is used to produce routing slips for one individual patient, all patients, or add-ons (patients scheduled for appointments since routing slips were last printed).

VISIT RPT BY TRANSMITTED OPT ENCOUNTER

This option is used to generate a report providing encounter and visit information for a specified date range.

WORKLOAD REPORT

This option is used to generate a variety of reports showing clinic workload. These help in determining the kinds of activity within clinics during a specified date range.

Appointment List

Introduction

The Appointment List option is used to generate appointment lists for one/many/all clinic(s) for a specified date. At multidivisional facilities, one/many/all divisions may be specified. You may include only “count” clinics, “non-count” clinics, or both. All clinics chosen have to be associated with one of the selected divisions. Primary care assignment information may be included in the output if so desired.

You may specify the number of desired copies of the list. A separate list is produced for each designated clinic and appointments are listed chronologically by appointment time within each list.

The appointment list generated will include the name and date of the clinic, the run date, appointment time, patient name, and SSN. If applicable, the following data will also be provided: lab, x-ray, and EKG test times, ward location, room/bed, and other patient-specific information. This may include patient being seen as a collateral, patient is enrolled over a year and is a non-vet or NSC, chart requested and current Means Test status and date of the last test, or if there is an entry in the MEANS TEST file. If a NSC patient has been enrolled for more than one year, a message will print to that effect asking that the patient be re-evaluated. Overbooks will be denoted by an asterisk (*) beside the patient name. A variety of messages, such as those regarding Means Test status and Copay Exemption status, are displayed when applicable.

If you are utilizing a device with barcode capabilities, you may choose to have the patient's SSN printed in barcode form. If wands are available at clinic locations, these barcodes may be used for patient check in and checkout.

Example

Printing to a device **without** barcode capabilities.

```
Select division: ALL// ALBANY
Select another division: <RET>
```

```
Count, Non Count, or Both: C//B
```

```
Select clinic: ALL// DERMATOLOGY
Select another clinic: <RET>
```

```
For date: 2/12/99 (FEB 12, 1999)
```

```
Include Primary Care assignment information in the output? NO// YES
```

Appointment List

Example

Number of copies: 1// <RET>

DEVICE: HOME// <RET> RIGHT MARGIN: 80// <RET>

Appointments for DERMATOLOGY clinic on FRIDAY FEB 12, 1999
Date printed: SEP 14, 1999@08:25

| Appt. Time | Patient Name | SSN | Lab Time | X-Ray Time | EKG Time |
|---------------|-------------------|---------------------------|-------------|---------------|-------------|
| | Other Information | Ward Location Room-Bed | | | |

8:00 AM

| | |
|---|-----------|
| SMITH,CLAYTON S. (P) | 122333444 |
| ** Requires Special Survey Disposition ** | |

| | |
|-------------|-----------|
| CASEY,BRENT | 414565118 |
| 7B BLIND | |
| 703B-3 | |

9:00 AM

| | |
|------------------------------------|-----------|
| BAILEY,JUANITA | 423368010 |
| Primary Care Team: GREEN | |
| PC Provider: HENSON,DONALD | |
| Associate Provider: JOHNSON,DANIEL | |

| | |
|---|-----------|
| BISHOP,DALE G. | 473627632 |
| ** Requires Special Survey Disposition ** | |

10:00 AM

| | |
|-----------|-----------|
| AGNEW,N J | 126127889 |
|-----------|-----------|

Patient Profile MAS

Introduction

The Patient Profile MAS option is used to generate a complete profile for a patient or a profile for a specified date range. Information which may be accessed includes demographic, appointments, add/edits, dispositions, enrollments, means test, and team information.

You may utilize either the roll and scroll format or the List Manager format while using this option. The same information is available through both formats. To choose the List Manager format, answer NO at the "Do you want to print the profile?" prompt. The following are the available actions which may be selected.

DISPLAY INFO

Allows you to display selected information to the screen.

PRINT PROFILE

Allows you to print selected information to a specified device.

CHANGE PATIENT

Allows you to enter another patient without exiting the option.

CHANGE DATE RANGE

Allows you to select another date range for the same patient without exiting the option.

TEAM INFORMATION

Allows you to display information for all teams to which the selected patient is assigned.

Example

```
Select PATIENT NAME: WHELAN, MICHAEL    08-31-62    508083162    YES    SC VETERAN
JONES, HARRY    AQUA
```

Select one of the following:

```

R          Range
A          All
```

Do you want a (R)ange or (A)ll: All// **<RET>**

Do you want to print the profile? YES// **NO**

Patient Profile MAS**Example**

Patient Profile Apr 05, 1999 09:17:37 Page: 1 of 2
 Patient: WHELAN,MICHAEL (3162) All Dates Outpati ent

Date of Birth: AUG 31, 1962 Marital Status: NEVER MARRIED
 Sex: MALE Religious Pref.: PRESBYTERIAN
 Patient ID: 508-08-3162 Occupation: ENGINEER
 Who entered: WHELAN,ROBERT Place of Birth: MT. CLEMENS, MI
 Date entered: 07/15/92
 Current Means Test: NO LONGER REQUIRED Date Means Test: 06/11/93

Primary Eligibility: SC LESS THAN 50%
 Other Eligibilities:

VETERAN (Y/N): YES
 Type: SC VETERAN

+ Enter ?? for more actions

DI Display Info CP Change Patient TI Team Information
 PP Print Profile CD Change Date Range
 Select Action: Next Screen// **TI**

Display Information Apr 05, 1999 09:17:59 Page: 1 of 1
 Patient: WHELAN,MICHAEL (3162) All Dates Outpatient

***** Team Information *****

Primary Care Team: AQUA Phone: 2656
 PC Provider: JONES,HARRY Position: PHYSICIAN1
 Pager: 678-0000 Phone: 445-9008
 Associate Provider: PETERS,CARL Position: NEURO RESIDENT
 Pager: 678-0123 Phone: 445-9005

 Non-PC Team: MENTAL HEALTH Phone: 2677
 Non-PC Provider: BILLS,WILLIAM Position: PSYCHOLOGIST
 Pager: 678-0889 Phone: 445-9876

Enter ?? for more actions

Select Action: Quit// **<RET>**

Patient Profile MAS**Example**

| | | |
|---------------------------------|-----------------------|--------------|
| Patient Profile | Apr 05, 1999 09:17:37 | Page: 1 of 2 |
| Patient: WHELAN, MICHAEL (3162) | All Dates | Outpatient |

| | |
|--|--------------------------------|
| Date of Birth: AUG 31, 1962 | Marital Status: NEVER MARRIED |
| Sex: MALE | Religious Pref.: PRESBYTERIAN |
| Patient ID: 508-08-3162 | Occupation: ENGINEER |
| Who entered: WHELAN, ROBERT | Place of Birth: MT CLEMENS, MI |
| Date entered: 07/15/92 | |
| Current Means Test: NO LONGER REQUIRED | Date Means Test: 06/11/93 |

Primary Eligibility: SC LESS THAN 50%

Other Eligibilities:

VETERAN (Y/N): YES
Type: SC VETERAN

| | | |
|------------------------------------|----------------------|---------------------|
| + Enter ?? for more actions | | |
| DI Display Info | CP Change Patient | TI Team Information |
| PP Print Profile | CD Change Date Range | |
| Select Action: Next Screen// | | |

PCMM Reports

Detailed Patient Assignments

Introduction

This option generates a report which lists patients assigned to selected teams and selected clinics. The report can be printed for those patients who are assigned to the team for primary care (assigned) or for those patients who are assigned to the team for something other than primary care (unassigned). The report may be used prior to team/position assignments in order to help validate clinic enrollments.

When selecting teams and clinics, you may enter A for ALL (uppercase), or you may select individual teams and clinics (maximum of 20 each). The report requires 132 column output.

Example

Select Division: ALL// **ALBANY** NY VAMC 500
Select another Division: ALL// **<RET>**

Select Team: **GREEN**
Select another Team: **<RET>**

Select Clinic: **ALL**

(A)ssigned or (U)nassigned Patients to Primary Care: **A**

This report requires 132 column output !

DEVICE: HOME// **A100** RIGHT MARGIN: 80// **<RET>**

Printed on: 05/23/99 Detailed Patient Assignments - Assigned PC PAGE: 1

Division: ALBANY

Team: GREEN

| Patient Name | Pt ID | M.T. Stat | Prim Elig | Last Appt | Next Appt | Enrolled Clinic | Primary Care Provider | Associate Provider |
|--------------|-------|--------------|--------------|--------------|--------------|--------------------|--------------------------|-----------------------|
| CHESNEY,KEN | 1280 | R | NSC | 5/5/99 | 7/6/99 | GEN MED | JONE, SAM | ABBOT,JAY |
| MCKEE,DAVID | 1740 | C | NSC | 4/30/99 | 7/13/99 | GEN MED | JONE,SAM | MILLER,KAY |
| MOSES,JUDI | 1641 | R | NSC | 2/11/99 | 8/3/99 | CARDIO | HARRIS,JOSIE | |

PCMM Reports

Historical Assignment Reports

Historical Patient Assignment Detail

Introduction

This option is used for printing all provider, position, and team assignments that exist for a selected patient during a specified date range.

The patient's current primary care provider and team may be displayed before the date range selection prompts.

Example

```

                                Historical Patient Assignment Detail
Select PATIENT NAME:  HARRIS,JOHN    02-11-23    309200399    NO    NSC

    ROY,JAMES    GREEN

Select beginning date: TODAY//  1 1 99    (JAN 01, 1999)

    Select ending date: TODAY//  <RET>    (JUL 02, 1999)

DEVICE: HOME//  <RET>
```

PCMM Reports

Historical Assignment Reports

Historical Patient Assignment Detail

Example

```

-----
                <*>  HISTORICAL PATIENT ASSIGNMENT DETAIL  <*>
                For assignments effective JAN 1,1999 to JUL 2,1999
-----
Date printed: JUL 2,1999@08:17                               Page: 1
-----
Patient: HARRIS,JOHN   SSN: 309200399   DOB: FEB 11,1923   AGE: 76       MALE
-----
Assignment              Active      Inactive    Assigned by/date
-----
PC Provider:
ROY,JERRY               06/18/1999

PC Associate Provider:   (none found)

PC Position:
PHYSICIAN              06/22/1999          BAILEY,CHARLES (06/22/1999)

PC Preceptor Position:  (none found)

PC Team:
GREEN                  06/22/1999          BAILEY,CHARLES (06/22/1999)

Non-PC Provider:
SULLSMAN,GEORGE        06/06/99            JONES,TIMOTHY (06/05/99)
KERSHAW,HARRY          05/04/99    06/05/99    JONES,TIMOHTY (05/03/99)

Non-PC Position:
PHYSICIAN              06/06/99            JONES,TIMOTHY (06/05/99)

Non-PC Preceptor Provider: (none found)

Non-PC Preceptor Position: (none found)

Non-PC Team:
PURPLE                  02/22/1999          BARKLEY,JOHN (02/22/1999)

```

PCMM Reports

Historical Assignment Reports

Historical Provider Position Assignment Listing

Introduction

This option is used for printing provider position assignments that exist during a specified date range for selected divisions, teams, positions, providers, and enrolled clinics. Sort criteria includes type of assignments, summary or detail report, and output sort order.

The summary report includes primary care (yes/no), maximum patients allowed, assigned patients (pc and non-pc), open slots, and precepted patients (pc and non-pc). The detail report includes the summary report plus provider name, position, and associated clinic.

The report requires 132 column output.

Example

```

          **** Date Range Selection ****

Select beginning date: TODAY// 6 1 99    (JUN 01, 1999)

Select ending date: TODAY// <RET>    (JUL 09, 1999)

          **** Report Parameter Selection ****

Select one of the following:

      P      PRIMARY CARE ASSIGNMENTS
      N      NON-PRIMARY CARE ASSIGNMENTS
      B      BOTH PC AND NON-PC

Specify the type of assignments to include: BOTH// p  PRIMARY CARE
ASSIGNMENTS

Select one of the following:

      D      DETAIL + SUMMARY
      S      SUMMARY ONLY

Specify output format: DETAIL + SUMMARY// s  SUMMARY ONLY

```

PCMM Reports

Historical Assignment Reports

Historical Provider Position Assignment Listing

Example

```

          **** Division Selection ****

Select Division: ALL//  albany  NY   VAMC   500

Select Division: <RET>

          **** Team Selection ****

Select Team: ALL//  GREEN

Select Team: <RET>

          **** Team Position Selection ****

Select Team Position: ALL//  <RET>   (ALL)

          **** Assigned Provider Selection ****

Select Assigned Provider: ALL//  <RET>   (ALL)

          **** Enrolled Clinic Selection ****

Select Enrolled Clinic: ALL//  <RET>   (ALL)

          **** Output sort order (optional) ****

Select one of the following:

    DV      DIVISION
    TM      TEAM
    TP      TEAM POSITION
    PR      PROVIDER
    EC      ENROLLED CLINIC

Sort output by:  tm   TEAM

Select one of the following:

    DV      DIVISION
    TP      TEAM POSITION
    PR      PROVIDER
    EC      ENROLLED CLINIC

Within TEAM, sort by: <RET>
```

PCMM Reports
Historical Assignment Reports
Historical Provider Position Assignment Listing

Example

Historical Provider Position Assignment Listing

**** Report Parameters Selected ****

Date Range: JUN 1,1999 to JUL 9,1999

Type of Assignments: PRIMARY CARE ASSIGNMENTS

Report Format: SUMMARY ONLY

Division: ALBANY

Team: GREEN

Team Position: ALL

Assigned Provider: ALL

Enrolled Clinic: ALL

Output will be sorted by: TEAM
PROVIDER

OK? YES// <RET>

This report requires 132 column output!

DEVICE: HOME// A100 RIGHT MARGIN: 80// 132

PCMM Reports
Historical Assignment Reports
Historical Provider Position Assignment Listing

Example

```
-----
                        <*>  HISTORICAL PROVIDER POSITION ASSIGNMENT LISTING  <*>
                        Selected Report Parameters
-----
Date printed: JUL 9,1999@13:30                                         Page: 1
-----

                        Date Range: JUN 1,1999 to JUL 9,1999

Type of Assignments: PRIMARY CARE ASSIGNMENTS

Report Format: SUMMARY ONLY

Division: ALBANY

Team: GREEN

Team Position: ALL

Assigned Provider: ALL

Enrolled Clinic: ALL

Output will be sorted by: TEAM
```


PCMM Reports

Historical Assignment Reports

Historical Provider Position Assignment Listing

Example

```

-----
                <*>  HISTORICAL PROVIDER POSITION ASSIGNMENT LISTING  <*>
                Summary for Provider Position Assignments Effective: JUN 1,1999 to JUL 9,1999
-----
Date printed: JUL 9,1999@13:30                                     Page: 1
-----

```

| Division | | Max. | ---Assigned--- | | | ---Precepted--- | |
|---------------|-----|--------|----------------|--------|-------|-----------------|--------|
| Team | PC? | Pts. | ---Patients--- | | Open | ---Patients--- | |
| | | Allow. | PC | Non-PC | Slots | PC | Non-PC |
| ALBANY | YES | 0 | 3 | 0 | 0 | 0 | 0 |
| GREEN | YES | 0 | 3 | 0 | 0 | 0 | 0 |
| REPORT TOTAL: | | 0 | 3 | 0 | 0 | 0 | 0 |

```

-----
NOTE:  Although presented by division and team, the maximum patients allowed,
       assigned patients, open slots and precepted patients reflected in this
       summary represent a sum of those categories for the provider position
       assignments identified within the user specified parameters of this report
       and may not match the maximum patients, etc. defined for the team as a whole.
-----

```

PCMM Reports

Historical Assignment Reports

Historical Patient Position Assignment Listing

Introduction

This option is used for printing patient position assignments that exist during a specified date range for selected divisions, teams, positions, providers, and enrolled clinics. Sort criteria includes type of assignments, summary or detail report, and output sort order. The summary report includes category, count, and percent. The detail report includes the summary report plus patient name, patient ID, primary eligibility, Means Test category, team, provider, team position, enrolled clinic, activation and inactivation date.

The report requires 132 column output.

Example

```

          **** Date Range Selection ****

Select beginning date: TODAY// 6 1 99    (JUN 01, 1999)

Select ending date: TODAY// <RET>    (JUL 09, 1999)

          **** Report Parameter Selection ****

Select one of the following:

P          PRIMARY CARE ASSIGNMENTS
N          NON-PRIMARY CARE ASSIGNMENTS
B          BOTH PC AND NON-PC

Specify the type of assignments to include: BOTH// p    PRIMARY CARE
ASSIGNMENTS

Select one of the following:

D          DETAIL + SUMMARY
S          SUMMARY ONLY

Specify output format: DETAIL + SUMMARY// s    SUMMARY ONLY

          **** Division Selection ****

Select Division: ALL// albany    NY    VAMC    500

Select Division: <RET>
```

PCMM Reports

Historical Assignment Reports

Historical Patient Position Assignment Listing

Example

```

          **** Team Selection ****

Select Team: ALL// GREEN

Select Team: <RET>

          **** Team Position Selection ****

Select Team Position: ALL// <RET>    (ALL)

          **** PC Provider Selection ****

Select PC Provider: ALL// <RET>    (ALL)

          **** Assigned Provider Selection ****

Select Assigned Provider: ALL// <RET>    (ALL)

          **** Enrolled Clinic Selection ****

Select Enrolled Clinic: ALL// <RET>    (ALL)

          **** Output sort order (optional) ****

Select one of the following:

    DV      DIVISION
    TM      TEAM
    TP      TEAM POSITION
    PR      PROVIDER
    EC      ENROLLED CLINIC
    PA      PATIENT

Sort output by: tm    TEAM

Select one of the following:

    DV      DIVISION
    TP      TEAM POSITION
    PR      PROVIDER
    EC      ENROLLED CLINIC
    PA      PATIENT

Within TEAM, sort by: <RET>

```

PCMM Reports
Historical Assignment Reports
Historical Patient Position Assignment Listing

Example

Historical Patient Position Assignment Listing

**** Report Parameters Selected ****

Date Range: JUN 1,1999 to JUL 9,1999

Type of Assignments: PRIMARY CARE ASSIGNMENTS

Report Format: SUMMARY ONLY

Division: ALBANY

Team: GREEN

Team Position: ALL

PC Provider: ALL

Assigned Provider: ALL

Enrolled Clinic: ALL

Output will be sorted by: TEAM
PATIENT

OK? YES// <RET>

This report requires 132 column output!

DEVICE: HOME// A100 RIGHT MARGIN: 80// 132

PCMM Reports

Historical Assignment Reports

Historical Patient Position Assignment Listing

Example

```
-----
<*>  HISTORICAL PATIENT POSITION ASSIGNMENT LISTING  <*>
      Selected Report Parameters
-----
Date printed: JUL 9,1999@13:30                               Page: 1
-----
```

```

      Date Range: JUN 1,1999 to JUL 9,1999
Type of Assignments: PRIMARY CARE ASSIGNMENTS
      Report Format: SUMMARY ONLY
      Division: ALBANY
      Team: GREEN
      Team Position: ALL
      PC Provider: ALL
      Assigned Provider: ALL
      Enrolled Clinic: ALL
Output will be sorted by: TEAM

```

```
-----
<*>  HISTORICAL PATIENT POSITION ASSIGNMENT LISTING  <*>
      Summary for Patient Position Assignments Effective: JUN 1,1999 to JUL 9,1999
-----
Date printed: JUL 9,1999@13:30                               Page: 1
-----
```

| Category | Count | Percent |
|-------------------------|-------|---------|
| ----- | | |
| --PRIMARY ELIGIBILITY-- | | |
| COLLATERAL OF VET. | 1 | 16.67 |
| NSC | 2 | 33.33 |
| SC LESS THAN 50% | 1 | 16.67 |
| WORLD WAR I | 1 | 16.67 |
| [unknown] | 1 | 16.67 |
| --MEANS TEST CATEGORY-- | | |
| (not applicable) | 4 | 66.67 |
| CATEGORY A | 1 | 16.67 |
| REQUIRED | 1 | 16.67 |

PCMM Reports

Historical Assignment Reports

Historical Patient Position Assignment Listing

Example

| | | |
|---|---|--------|
| --GENDER-- | | |
| FEMALE | 3 | 50.00 |
| MALE | 3 | 50.00 |
| --AGE GROUP-- | | |
| 105 - 114 | 1 | 16.67 |
| 45 - 54 | 3 | 50.00 |
| 5 - 14 | 1 | 16.67 |
| 75 - 84 | 1 | 16.67 |
| --NATIONAL ENROLLMENT PRIORITY-- | | |
| ~~~NONE~~~ | 6 | 100.00 |
| --TEAM-- | | |
| GREEN | 6 | 100.00 |
| --PRIMARY CARE-- | | |
| YES | 6 | 100.00 |
| --ASSIGNED PROVIDER-- | | |
| DEFIBAUGH,ELIZABETH | 3 | 50.00 |
| WHELAN,ROBERT | 3 | 50.00 |
| --DIVISION-- | | |
| ALBANY | 6 | 100.00 |
| Total assignments that meet the parameters of this report: 6 100.00 | | |
| Total unique patients that meet the parameters of this report: 6 100.00 | | |

NOTE: More than one provider may be associated with a single patient position assignment. The sum of assignments related to providers detailed in this summary is likely to be greater than the actual number of patient position assignments returned by this report.

PCMM Reports

Historical Assignment Reports

Historical Team Assignment Summary

Introduction

This option is used for printing counts of team and team position assignments and unique patients within a specified date range. If there are any team assignments without active position assignments, these patients will be listed out separately.

The report requires a 132 column output.

Example

```

          **** Date Range Selection ****
Select beginning date: TODAY// 6 1 99    (JUN 01, 1999)
      Select ending date: TODAY// <RET>    (JUL 09, 1999)

          **** Report Parameter Selection ****

          **** Division Selection ****

Select Division: ALL// albany    NY    VAMC    500
Select Division: <RET>

          **** Team Selection ****

Select Team: ALL// green
Select Team: <RET>

          **** Report Parameters Selected ****

          Date Range: JUN 1,1999 to JUL 9,1999

          Division: ALBANY

          Team: GREEN

OK? YES// <RET>

This report requires 132 column output!

DEVICE: HOME// A100    RIGHT MARGIN: 80// 132

```

PCMM Reports

Historical Assignment Reports

Historical Team Assignment Summary

Example

<*> HISTORICAL TEAM ASSIGNMENT SUMMARY <*>

Selected Report Parameters

Date printed: JUL 9,1999@14:47

Page: 1

Date Range: JUN 1,1999 to JUL 9,1999

Division: ALBANY

Team: GREEN

<*> HISTORICAL TEAM ASSIGNMENT SUMMARY <*>

Summary of Team and Team Position Assignments Effective: JUN 1, 1999 to JUL 9, 1999

Date printed: JUL 9,1999@14:47

Page: 1

| Division | | Max. | Team | Team | --Team Position-- | | --Team Position-- | | Total | | Pts w/o | Pts w/o |
|---------------|-----|------|---------|---------|-------------------|--------|-------------------|--------|--------|-------|---------|---------|
| Team | PC? | Pts. | Assign. | Assign. | ---Assignments--- | | ---Unique Pts--- | | Unique | Open | Pos. | Team |
| | | | | Uniques | PC | Non-PC | PC | Non-PC | Pts. | Slots | Assign. | Assign. |
| ALBANY | YES | 200 | 28 | 22 | 6 | 0 | 6 | 0 | 22 | 178 | 16 | 0 |
| GREEN | YES | 200 | 28 | 22 | 6 | 0 | 6 | 0 | 22 | 178 | 16 | 0 |
| REPORT TOTAL: | | 200 | 28 | 22 | 6 | 0 | 6 | 0 | 22 | 178 | 16 | 0 |

NOTE: This report represents a count of team and team position assignments within the date range selected. If a date range larger than one day has been selected, the total unique patients and assignments may be greater than the maximum defined for the team, reducing the open slots reflected by this report accordingly. However, this does not imply that the team had more than its maximum number of patients on any single date.

| | | | | | |
|--|-------|----------------|-----------|-------------|-------------|
| ----- | | | | | |
| <*> HISTORICAL TEAM ASSIGNMENT SUMMARY <*> | | | | | |
| Team Assignments Without Active Position Assignments Effective: JUN 1,1999 to JUL 9,1999 | | | | | |
| ----- | | | | | |
| Date printed: JUL 9,1999@14:47 | | | | | |
| ----- | | | | | |
| Division | Team | Patient Name | SSN | Active Date | Inact. Date |
| ----- | | | | | |
| ALBANY | GREEN | ABBOTT,JOHN A | 096388543 | JUN 17,1999 | JUN 27,1999 |
| ALBANY | GREEN | ANDERS,MICHAEL | 123334545 | JUN 27,1999 | |
| ALBANY | GREEN | BRAND,XAVIER | 098665747 | MAY 20,1996 | |
| ALBANY | GREEN | DISTASO,WARREN | 554426654 | MAR 6, 1996 | |

PCMM Reports

PCMM Inconsistency Report

Introduction

This option is used to print the inconsistencies that may exist as a result of the new business rules that were established in Phase II of PCMM. The report may be run for one/many/all teams. You may choose from the following outputs - brief, detailed by patient, or detailed by team.

A list of inconsistency descriptions may be printed along with the steps for correction. Detailed instructions can be found in the PCMM User Guide.

Depending on the sort criteria, the report may take a long time to run. Queueing is recommended.

Example

```

                                PCMM INCONSISTENCY REPORT
-----

T E A M S

    Select one of the following:

        A      All Teams
        S      Specific Teams
        I      Inconsistency Descriptions

    Select TEAMS: A    All Teams

R E P O R T   T Y P E

    Select one of the following:

        B      Brief
        DP     Detailed by PATIENT
        DT     Detailed by TEAM

    Select REPORT TYPE: DP// B    Brief

This report may take a long time to run.
Queueing is recommended.

DEVICE: HOME// <RET>
Please wait...
```

PCMM Reports

PCMM Inconsistency Report

Example

```

                                PCMM INCONSISTENCY REPORT
                                Aug 02, 1999@09:20
=====
Teams: All teams
=====

POSITION INCONSISTENCIES
-----

Total teams/positions per inconsistency type:
    Position has no staff assigned - 59
    AP & PCP are the same provider - 2

PATIENT INCONSISTENCIES
-----

Total patients per inconsistency type:
    Patient has no PCP assigned - 4
    Patient has multiple PCPs assigned - 26
    PCP position is not designated for PC - 3
    Position assignment with inactive Team Assign/Team/Position - 374
```

PCMM Reports

Individual Team Profile

Introduction

This option generates a report displaying basic team definition information for selected teams. When selecting teams, you may enter A for ALL (uppercase), or you may select individual divisions and teams (maximum of 20 each).

Information provided may include the following: team name and phone number, service/section associated with the team, team purpose, maximum number of patients allowed, unique patients assigned, team description, team positions, standard role associated with the position, provider name, whether or not the position can provide primary care, number of patients allowed and assigned for each position, and associated clinic.

The report requires 132 column output.

Example

```
Select Division: ALL// ALBANY   NY   VAMC   500
Select another Division: <RET>
```

```
Select Team: ALBBLUE
Select another Team: <RET>
```

This report requires 132 column output!

```
DEVICE: HOME// A100           RIGHT MARGIN: 80// 132
```

PCMM Reports Individual Team Profile

Example

Printed on: 05/23/99

Individual Team Profile

PAGE: 1

Division: ALBANY

Team Name: ALBBLUE

Service/Section: MEDICINE

Team Phone: x444

Team Settings:

Status: ACTIVE

Maximum Patients: 400

Unique Patients Assigned: 21

Purpose: PRIMARY CARE

This team is still accepting patients.

Team Description:

General Internal Medicine/Primary Care - 1C

| Team Position | Provider Name | Standard Role | PC? | Patients Allowed | Patients Assigned | Associated Clinic |
|------------------|------------------|------------------------|-----|---------------------|----------------------|----------------------|
| Physician | WEST,JAMES | PHYSICIAN-PRIMARY CARE | PCP | 10 | 9 | |
| Nurse | JAMES,ETHEL | NURSE PRACTITIONER | NPC | 10 | 9 | |

PCMM Reports

Patient Listing for Team Assignments

Introduction

This option generates a listing of patients assigned to selected team(s). When selecting teams, roles, or practitioners, you may enter A for ALL (uppercase), or you may select individual teams, roles, and practitioners (maximum of 20 each). Role and practitioner selections will be limited to those associated with the selected teams.

If you enter NONE for a practitioner, the report lists patients without that kind of assignment (e.g., no Primary Care practitioner). The PCMM software no longer allows this to happen; however, this report can be used to help correct these older problem assignments.

Information provided may include patient name, patient ID, date the patient was assigned to the position, whether or not the position can provide primary care, practitioner name, position, standard role, and preceptor.

The report requires 132 column output.

Example

Select Division: ALL// **ALBANY** NY VAMC 500
 Select another Division: <RET>

Select Team: **PURPLE**
 Select another Team: <RET>

Select Role: **A**

Select Practitioner: **A**

This report requires 132 column output!

DEVICE: HOME// <RET> LAT

Section 3 - Outputs Menu

PCMM Reports Patient Listing for Team Assignments

Example

Printed on: 05/23/99

Patient Listing for Team Assignments

PAGE: 1

Division: ALBANY

Team: PURPLE

Primary Care Team: YES

| Patient Name | Pt ID | Date Assigned | PC? | Practitioner | Position | Standard Role | Preceptor |
|-----------------|-------|------------------|-----|----------------|-----------|-------------------|-------------------------|
| CHESNEY,MATT. | 1259 | 03/26/99 | PCP | JOHNSON,MARTIN | Physician | INTERN(PHYSICIAN) | PHYSICIAN -PRIMARY CARE |
| SMITH,CHARLES | 9710 | 03/15/99 | NPC | ENGLISH,PETER | Nurse -RN | NURSE (RN) | |
| TRAYNOR,KELLY | 1280 | 03/05/99 | NPC | ENGLISH,PETER | Nurse -RN | NURSE (RN) | |

PCMM Reports

Practitioner Demographics

Introduction

This option generates a report displaying information for a practitioner(s).

For each team the selected practitioner is assigned to, the following information may be listed: team name, service/section, team position, standard role for that position, user class required to fill that position, room number, phone number, number of patients allowed and assigned that position, preceptor, person class, and the clinic associated with the position.

Example

Select Practitioner: **ENGLISH,PETER**
 Select another Practitioner: **JONES,RICK**
 Select another Practitioner: **<RET>**

DEVICE: HOME// **<RET>** LAT

Printed on: 05/23/99

Practitioner Demographics

PAGE: 1

| | |
|------------------------------|------------------------|
| Name: ENGLISH,PETER | Serv./Sect.: MEDICINE |
| Team: BLUE | Position: CARDIOLOGIST |
| Role: PHYSICIAN-PRIMARY CARE | User Class: PHYSICIAN |
| Room: 803C | Pts. Allowed: 20 |
| Phone: 222-2222 | Pts. Assigned: 10 |
| Assoc. | |
| Clinic: | |

Printed on: 05/23/99

Practitioner Demographics

PAGE: 2

| | |
|----------------------------|-------------------------------|
| Name: JONES,RICK | Serv./Sect.: MEDICINE |
| Team: PURPLE | Position: PHYSICIAN ASSISTANT |
| Role: PHYSICIAN ASSISTANT | User Class: |
| Room: | Pts. Allowed: 20 |
| Phone: | Pts. Assigned: 10 |
| Preceptor: HARVNELL,ROBERT | |
| Assoc. | |
| Clinic: GENERAL MEDICAL | |

PCMM Reports Practitioner's Patients

Introduction

This option generates a report identifying the size and constituents of a practitioner's patient panel.

When selecting teams, roles, and practitioners, enter A for ALL (uppercase) or select individual teams, roles, and practitioners (maximum of 20 each). Role and practitioner selections will be limited to those associated with the selected teams.

If you answer YES at the "Print Summary Only" prompt, the output will include the following data elements for each practitioner: practitioner name, position, team, and number of patients assigned.

If you answer NO at the "Print Summary Only" prompt, the output will include the data mentioned above plus the following fields for each applicable patient: name, ID, Means Test status, primary eligibility, last appointment, next appointment, and clinic.

If the practitioner has a preceptor, the preceptor will also be listed.

Example

```
Select Division: ALL// ALBANY   NY   VAMC   500
Select another Division: <RET>

Select Team: AQUA
Select another Team: <RET>

Select Role: A

Select Practitioner: A

Print Summary Only? N// NO

Sort By:
    [1] Division, Team, Practitioner
    [2] Division, Practitioner, Team

Select 1 or 2: 1

DEVICE: HOME// A100      RIGHT MARGIN: 80// <RET>
```


PCMM Reports Practitioner's Patients

Example

Printed on: 05/23/99

Practitioner's Patients

Page: 1

Team: AQUA
 Division: ALBANY
 Practitioner: JOHNSON,MARTIN (PHYSICIAN ASSISTANT)
 Preceptor: LEWIS,MAXWELL

| Pt Name | Pt ID | M.T. Stat | Prim Elig | Last Appt | Next Appt | Clinic |
|-----------------|-------|--------------|--------------|--------------|--------------|---------|
| CHESNEY,MATTHEW | 1259 | | SC < 50 | 04/09/99 | 11/10/99 | SURGERY |

Patient Count for JOHNSON,MARTIN: 1

Printed on: 05/23/99

Practitioner's Patients

Page: 2

Team: AQUA
 Division: ALBANY
 Practitioner: LEWIS,MAXWELL (PHYSICIAN)

| Pt Name | Pt ID | M.T. Stat | Prim Elig | Last Appt | Next Appt | Clinic |
|-----------------|-------|--------------|--------------|--------------|--------------|---------|
| CHESNEY,MATTHEW | 1259 | | SC < 50 | 04/09/99 | 11/10/99 | SURGERY |
| CURTIS,WILLIAM | 0990 | C | NSC | 04/16/99 | 08/19/99 | ENT |

Patient Count for LEWIS,MAXWELL: 2

Printed on: 05/23/99

Practitioner's Patients Summary Report

Page: 1

| Practitioner | Position | Team | Patients Assigned |
|----------------|----------------------|------|----------------------|
| JOHNSON,MARTIN | PHYSICIAN ASS ISTANT | AQUA | 1 |
| LEWIS,MAXWELL | PHYSICIAN | AQUA | 2 |

PCMM Reports

Summary Listing of Teams

Introduction

This option generates a report which displays the number of patients assigned to each practitioner assigned to the team. This provides helpful information to practitioners regarding the size of their patient panels.

When selecting teams and roles, you may enter A for ALL (uppercase), or you may select individual teams and roles (maximum of 20 each). Role selections will be limited to those associated with the selected teams.

The report requires 132 column output.

Example

Select Division: ALL// **ALBANY** NY VAMC 500
Select another Division: <RET>

Select Team: **GREEN**
Select another Team: <RET>

Select Role: **A**

This report requires 132 column output!

DEVICE: HOME// **A100** RIGHT MARGIN: 80// **132**

Printed on: 7/15/1999

Summary Listing of Teams

Page: 1

Division: ALBANY

Team Name: GREEN

| Practitioner | Position | PC? | Standard Role | Associated Clinic | Max. Pts. Allow. | --Assigned-- PC | --Patients-- NonPC | --Precepted-- PC | --Patients-- NonPC |
|---------------------------|-----------|-----|----------------------|-------------------|------------------------|--------------------|-----------------------|---------------------|-----------------------|
| DEFIBAUGH,MARGARET | LPN | PCP | NURSE (LPN) | | 45 | 0 | 1 | 0 | 1 |
| WHELAN,ROGER | PHYSICIAN | PCP | PHYSICIAN-PRIMARY CA | | 45 | 0 | 2 | 0 | 1 |
| Team Totals: | | | | | | | | | |
| Primary Care Assignments: | | 0 | | | | | | | |
| Non-PC Assignments: | | 3 | | | | | | | |

PCMM Reports Team Member Listing

Introduction

This option generates a report displaying information on selected teams and their members. This information may be used to review which practitioners were assigned to a team for a selected date range.

When selecting teams, user classes, and roles, you may enter A for ALL (uppercase), or you may select individual teams, user classes, and roles (maximum of 20 each). User class will be prompted for only if the user class functionality is turned on at your site. Role and user class selections will be limited to those associated with the selected teams.

Example

```
Select Division: ALL// ALBANY  NY  VAMC  500
Select another Division: <RET>
```

```
Select Team: BLUE
Select another Team: <RET>
```

```
Begin Date: Today// <RET>    (JUL 01, 1999)
End Date: Today// <RET>    (JUL 01, 1999)
```

```
Select Role: A
```

```
DEVICE: HOME// <RET>    UCX/TELNET
```

PCMM Reports Team Member Listing

Example

Printed on: 7/1/1999

Team Member Listing

Page: 1

Division: ALBANY

Team Name: BLUE

Primary Care Team: YES

Team Phone: 344

Members:

JONES,RICK

Position: PHYSICIAN ASSISTANT

Standard Role: PHYSICIAN ASSISTANT

User Class:

MEDICIANE

Assoc Clinic:

Office Phone:

Room:

Begin Date: 07/01/1999

End Date:

Preceptor: ROY,JERRY

ROY,JERRY

Position: PHYSICIAN

Standard Role: PHYSICIAN-PRIMARY CARE

User Class:

MEDICINE

Assoc Clinic:

Office Phone: 222-2222

Room:

Begin Date: 06/22/1999

End Date:

PCMM Reports

Team Patient Listing

Introduction

This option generates a report displaying a team's patients and associated clinics.

When selecting teams and roles, you may enter A for ALL (uppercase), or you may select individual teams and roles (maximum of 20 each). Role selections will be limited to those associated with the selected teams.

The report requires 132 column output.

Example

Select Division: ALL// **ALBANY** NY VAMC 500

Select another Division: **<RET>**

Select Team: **SILVER**

Select another Team: **<RET>**

Select Role: **A**

Sort By:

- [1] Division, Team, Patient Name
- [2] Division, Team, Last 4 Pt ID
- [3] Division, Team, Practitioner, Patient Name
- [4] Division, Team, Practitioner, Last 4 Pt ID

Select 1, 2, 3, or 4: **1**

This report requires 132 column output!

DEVICE: HOME// **A100**

RIGHT MARGIN: 80// **132**

Printed on: 05/07/99

Team Patient Listing

PAGE: 1

Division: ALBANY

Team: SILVER

Team Phone: 518-266-0169

Primary Care Team: YES

| Patient Name | Pt ID | Practitioner | Role | PC? | Last Appt. | Next Appt. | Associated Clinic |
|-------------------|-------|--------------|------------------------|-----|------------|------------|-------------------|
| BOLD,RICHARD B JR | 8565 | JONES,RICK | PHYSICIAN ASSISTANT | NPC | 03/07/99 | 08/05/99 | |
| BROWN,TOM | 0001 | JONES,RICK | PHYSICIAN ASSISTANT | NPC | 12/12/98 | 07/08/99 | |
| MINARDI,MAX A | 3242 | JONES,RICK | PHYSICIAN ASS Istant | NPC | 04/13/99 | 08/05/99 | |
| PETERSON,JAMES R | 9898 | ROY,JERRY | PHYSICIAN-PRIMARY CARE | PCP | 10/23/98 | 10/22/99 | |
| SMITH,DEBBIE | 1460 | JONES,RICK | PHYSICIAN ASSISTANT | NPC | 09/09/98 | 07/29/99 | |

Print Scheduling Letters

Introduction

This option allows you to print any one of the following types of scheduling letters for a selected date range.

APPOINTMENT CANCELLED
CLINIC CANCELLED
NO-SHOW
PRE-APPOINTMENT

You may choose to print the letter assigned to the clinic (through Set Up a Clinic option) or another letter of the same type. If you choose to print an assigned letter and the selected clinics do not have letters of the corresponding type assigned to them, no letters will print for those clinics. If you choose to print a letter other than the letter assigned to the clinic(s), the letter you select will print for all selected patients and clinics.

For PRE-APPOINTMENT type letters - if ALL is entered at the "Select clinic" prompt, letters will not print for any clinics designated as non-count clinics.

If you wish to print letters for the majority of clinics, enter ALL at the "Select clinic" prompt. You will then be asked if you wish to exclude any clinics and, if so, to name those clinics. This action prevents having to enter numerous individual clinic names.

Example

```
SELECT THE TYPE OF LETTER TO PRINT: N    NO-SHOW
PRINT LETTER ASSIGNED TO THE CLINIC(S)? YES// <RET>
NO-SHOW LETTERS FOR WHICH DIVISION: OUTPATIENT
Select clinic: ALL// DERMATOLOGY
Select another clinic: <RET>

**** Date Range Selection ***

Beginning DATE: T-10    (MAR 19, 1989)

Ending    DATE: T    (MAR 29, 1989)

DEVICE: HOME// LASER PRTR    RIGHT MARGIN: 80// <RET>
DO YOU WANT YOUR OUTPUT QUEUED? NO// <RET>    (NO)
```

Print Scheduling Letters

Example

03/29/89
321323211

EDWARD CARNEY
2 MAIN ST.
GREENVILLE NY 12110

Dear Mr. Carney,

This letter concerns your non-appearance for the appointment listed below:

THURSDAY MAR 23, 1989 11:00 AM DERMATOLOGY Clinic

The appointment(s) have been rescheduled as follows:

THURSDAY APR 27, 1989 10:00 AM DERMATOLOGY Clinic

This is the last appointment you will be given.

MARK T. CLARK
Chief, Amb. Care & Processing Section

Provider/Diagnosis Report

Introduction

This option is used to print a report of outpatient encounters for a selected date range. The Provider/Diagnosis Report sorts by division and outpatient encounter date. You also may choose two of the following additional sorts: provider, diagnosis, patient, clinic, or stop code.

Data contained in the report includes patient name and last four digits of SSN, encounter date and time, clinic name and stop code, provider and diagnostic code. The report is formatted to print at 132 columns. Depending on your sort selections, you may wish to queue to print during non-peak hours.

The totals of this report will vary depending on how the site uses the add/edit stop code functionality. If additional stop codes are added through the AE (add/edit) action of the Appointment Management option, the stop code will be associated with the scheduled appointment's date/time. Depending on sort criteria, these entries may print on the Provider/Diagnosis Report and may/may not be included in the totals.

If additional stop codes are added through the menu option Add/Edit Stop Codes, the entries will have different times than the actual appointment. In this case, these entries will print on this report and be included in the totals. For example, a clerk needs to add/edit a stop code for 108. Using the Add/Edit Stop Codes menu option, the referring clinic is entered as the Associated Clinic. When the Provider/Diagnosis report is generated for that clinic, it will count this stop code as workload.

In order for this report to be accurate, sites need to make the following adjustments.

- Add/edit stop codes only through the use of the AE action of the Appointment Management option.
- When using the Add/Edit Stop Codes option, change the procedure for Associated Clinic.

Provider/Diagnosis Report

Example

Select Outputs Option: **Provider/Diagnosis Report**

_____ Date Range Selection _____

Select Beginning Date: 07/29/93// **6/1** (JUN 01, 1993)

Select Ending Date: 07/29/93// **6/30** (JUN 30, 1993)

_____ First level sort will be by Division _____

_____ Select Second Sort Level _____

Select one of the following:

- 1 Provider
- 2 Diagnosis [DX]
- 3 Patient
- 4 Clinic
- 5 Stop Code

Select Sort Option: **1** Provider

_____ Sorting by Division and Provider _____

_____ Select Third Sort Level _____

Select one of the following:

- [Selected]
- 2 Diagnosis [DX]
- 3 Patient
- 4 Clinic
- 5 Stop Code

Select Sort Option: **3** Patient

_____ Select Providers _____

Select Provider: ALL// KAGAN,PETER

Select another Provider: **<RET>**

_____ Select Patients _____

Select Patient: ALL// **<RET>**

_____ Report Specifications _____

Encounter Dates: Jun 01, 1993 to Jun 30, 1993

Report will be sorted by Division,

Divisions Selected:

ALBANY

Then sorted by Provider, Patient and Encounter Date

Provider/Diagnosis Report

Example

Provider Selected:
KAGAN,PETER

Patient Selected: ALL

Continue? YES// <RET>
 This report requires 132 columns for printout
 DEVICE: HOME// **A138-16/6/UP** KYOCERA PRINTER RIGHT MARGIN: 132// <RET>
 DO YOU WANT YOUR OUTPUT QUEUED? NO// <RET> (NO)

...EXCUSE ME, I'M WORKING AS FAST AS I CAN...

Provider/Diagnosis Encounter Report sorted by Provider and Patient Report Date: JUL 29, 1993 Page: 1
 Inclusion Dates: Jun 01, 1993 to Jun 30, 1993
 Division: ALBANY

| PATIENT | ENCOUNTER DATE | CLINIC/STOP CODE | PROVIDER | DX CODE |
|-----------------------|-----------------------|--|--------------|---------|
| ----- | ----- | ----- | ----- | ----- |
| ABBOTT,JOHN A. 0101 | Jun 18, 1993@17:08 | UNSPECIFIED 102/ADMITTING/SCREENING | KAGAN,PETER | 405.01 |
| ABRAMS,SIDNEY 8276 | Jun 18, 1993@08:45:20 | CARDIOLOGY 107/EKG | KAGAN,PETE R | 446.20 |
| BIRD,DAVID 4444 | Jun 21, 1993@14:30 | GEN INT MED/DR P JONES 301/GENERAL MEDICINE | KAGAN,PETER | 414.0 |
| CANNEDY,JOHN 2020 | Jun 17, 1993@08:00 | AUDIOLOGY 203/AUDIOLOGY | KAGAN,PETER | 405.01 |
| FAGAN,FINBAR 8904 | Jun 21, 1993@15:06 | CARDIOLOGY 102/ADMITTING/SCREENING | KAGAN,PETER | 102.2 |
| GRAY,GAVIN 9283 | Jun 21, 1993@20:39 | UNSPECIFIED 102/ADMITTING/SCREENING | KAGAN,PETER | 599.0 |
| KILLEEN,JAMES 5118 | Jun 11, 1993@13:00 | GEN INT MED/DR P JONES 301/GENERAL MEDICINE | KAGAN,PETER | 401.9 |
| PEPPERCORN,DAVID 5118 | Jun 11, 1993@14:00 | GEN INT MED/DR P JONES 301/GENERAL MEDICINE | KAGAN,PETER | 401.9 |
| ROY,ROBERT 5118 | Jun 18, 1993@09:00 | GEN INT MED/DR P JONES 301/GENERAL MEDICINE | KAGAN,PETER | 401.9 |
| WILLIAMS,PAT 5118 | Jun 18, 1993@11:00 | GEN INT MED/DR P JONES 301/GENERAL MEDICINE | KAGAN,PETER | 401.9 |

10 Patient entries for KAGAN,PETER

Radiology Pull List

Introduction

The Radiology Pull List option is used to generate a listing of all patients whose radiology reports/films are required for their scheduled appointments. The report is run by date and sorted by terminal digit (SSN). The listing includes patient name, SSN, clinic name, and appointment date/time. Any appointments the patient has scheduled for later that same day will also be displayed.

Example

```
RADIOLOGY LIST FOR WHICH DIVISION: BROCKTON-DOM// <RET>
RADIOLOGY PULL LIST IN TERMINAL-DIGIT ORDER FOR WHAT DATE: 12 23 90    (DEC
23,1990)
```

```
DEVICE: HOME// <RET>                                RIGHT MARGIN: 80// <RET>
```

```
RADIOLOGY PULL LIST
Printed on DEC 21, 1990@15:06
```

| | | | |
|------|------------------------|------|-------------------|
| 2323 | SAMUELS, PHYLLIS | 4567 | JONES, JAMES W |
| | 234342323 | | 123124567 |
| | GENERAL SURGERY | | PHYSICAL THERAPY |
| | 12/23/90 08:00 | | 12/23/90 11:00 |
| 5546 | HASKELL, EDUARDO | 6880 | BARKLEY, HARRIS T |
| | 774635546 | | 883726880 |
| | PHYSICAL THERAPY | | PHYSICAL THERAPY |
| | 12/23/90 08:45 | | 12/23/90 10:15 |
| | LATER APPOINTMENTS: | | |
| | 11:00 GENERAL MEDICINE | | |

Routing Slips

Introduction

The Routing Slips option is used to print routing slips for one individual patient, all patients, or add-ons (patients scheduled for appointments since routing slips were last printed).

The routing slips may be sorted to print by terminal digit, patient name or clinic name. When sorted by clinic, one, many (limit 20), or all clinics may be included. If the slip is a reprint of a previous run, the original run date is also shown.

The routing slip shows the patient's rated disabilities and health insurance data, when applicable. Any future appointments are also listed (limited to the number that will fit on one page).

An area is provided to list the diagnoses and procedures performed during the clinic visits on that day and any of the following questions regarding service connection and exposure related conditions are included, when applicable.

Was treatment for SC Condition? __Yes __No

Was treatment related to Agent Orange Exposure? __Yes __No

Was treatment related to Ionizing Radiation Exposure? __Yes __No

Was treatment related to Environmental Contaminant Exposure? __Yes __No

A routing slip may be printed for a single patient even if there are no clinic visits scheduled for that patient on that day.

When all routing slips are printed, a total page will be provided showing the facility name, date and time the slips were printed, and the total number of slips printed.

Example

```
ROUTING SLIPS FOR WHICH DIVISION: BOSTON OPC// <RET>
DO YOU WANT ROUTING SHEET FOR A SINGLE PATIENT? No// <RET> (NO)
WANT (A)LL ROUTING SHEETS OR (O)NLY ADD-ONS: ONLY ADD-ONS// ALL ROUTING
SHEETS
PRINT IN (T)ERMINAL DIGIT, (N)AME OR (C)LINIC ORDER: T// <RET> TERMINAL
DIGIT
PRINT ROUTING SLIPS FOR WHAT DATE: T (MAY 14, 1993)
IS THIS A REPRINT OF A PREVIOUS RUN? No// <RET>

DEVICE: HOME// A-29 RIGHT MARGIN: 80// <RET>
DO YOU WANT YOUR OUTPUT QUEUED? NO// <RET>
```

Routing Slips

Example

*** FACILITY: BOSTON OPC

* * * * *

MEANS TEST REQUIRED

LAST TEST: APR 1,1992

* * * * *

PAGE 1 OUTPATIENT ROUTING SLIP

*** NSC ***

HARRIGAN,WILLY B

APPOINTMENT DATE

778-99-6810

05/14/93

88 THIRD STREET

ALBANY, NEW YORK 12208

Service Connected: NO

Disabilities: NONE STATED

Health Insurance: YES

| Insurance Co. | Subscriber ID | Group # | Holder | Effective | Expires |
|---------------|---------------|---------|-----------|-----------|----------|
| Prudential | 518 | L518 | APPLICANT | 03/30/96 | 03/30/99 |

CURRENT APPOINTMENTS

| TIME | CLINIC | LOCATION |
|----------|----------|-----------------|
| 12:00 PM | PODIATRY | WARD C ROOM 750 |

List diagnosis_____

List any procedures performed during this clinic visit _____

Was treatment related to Ionizing Radiation Exposure? __Yes __No

FUTURE APPOINTMENTS

| DATE | TIME | CLINIC | LOCATION |
|----------|---------|------------------|-----------------|
| 06/03/93 | 9:00 AM | PHYSICAL THERAPY | WARD D ROOM 320 |
| 06/06/93 | 9:00 AM | PHYSICAL THERAPY | WARD D ROOM 320 |

DATE PRINTED: 05/14/93

Routing Slips

Example

*** FACILITY: BOSTON OPC

PRINTED: MAY 14,1993@08:00

ROUTING SLIPS PRINTED FOR
MAY 14,1993

TOTAL NUMBER OF ROUTING SLIPS PRINTED: 2

Visit Rpt by Transmitted OPT Encounter

Introduction

The Visit Report by Transmitted Outpatient Encounter option provides a report which contains encounter and visit information. The report is divided into two sections. The first displays the transmission status of the encounters to the National Patient Care Data Base (NPCDB) for the selected date range. Statuses include the following.

| | |
|--------------|----------------------------------|
| WAITING | waiting to be transmitted |
| TRANSMITTED | transmitted but not acknowledged |
| ACKNOWLEDGED | transmitted and acknowledged |

The second section consolidates those encounters into total visits. You may select to print either section or both sections.

Encounters are grouped by veteran eligibility and then by category of visit. Compensation and Pension is an appointment type and is included in the Category of Visit totals. This breakout is for information only.

A visit consists of all encounters for a patient for a day. Visits are counted by facility so if a patient has one encounter in one division, and another encounter in a different division, only one visit is counted.

At multi-divisional facilities, you will have the option of printing division and site totals or site total only.

Example

From Date: NOV 25, 1996// **11 1 96** (NOV 01, 1996)

To Date: NOV 25, 1996// **<RET>** (NOV 25, 1996)

Select one of the following:

- 1 TRANSMISSION STATUS ONLY
- 2 VISIT COUNT
- 3 BOTH

SELECT REPORT OPTION: 3// **<RET>** BOTH

THIS IS A MULTI-DIVISIONAL FACILITY.

PRINT FACILITY TOTAL ONLY? NO// **<RET>**

DEVICE: HOME// **B109** RIGHT MARGIN: 80// **132**

DO YOU WANT YOUR OUTPUT QUEUED? NO// **<RET>** (NO)

Visit Rpt by Transmitted OPT Encounter

Example

ENCOUNTER REPORT BY TRANSMISSION STATUS TO NPCDB
NORTHERN DIVISION FOR PERIOD 11/01/96 THRU 11/25/96

| | ENCOUNTERS | | |
|---|------------|-------------|--------------|
| | WAITING | TRANSMITTED | ACKNOWLEDGED |
| ===== | | | |
| VETERAN ELIGIBILITY | | | |
| SERVICE CONNECTED 50% to 100% | 10 | 9 | 9 |
| AID & ATTENDANCE | 3 | 4 | 4 |
| SC LESS THAN 50% | 2 | 18 | 15 |
| NSC, VA PENSION | 0 | 34 | 30 |
| NSC | 5 | 23 | 20 |
| HOUSEBOUND | 0 | 0 | 0 |
| MEXICAN BORDER WAR | 0 | 0 | 0 |
| WORLD WAR I | 0 | 0 | 0 |
| PRISONER OF WAR | 0 | 0 | 0 |
| ----- | | | |
| Veteran Sub-Total | 20 | 88 | 78 |
| | | | |
| NON-VETERAN ELIGIBILITY | | | |
| OTHER FEDERAL AGENCY | 1 | 1 | 1 |
| ALLIED VETERAN | 0 | 0 | 0 |
| HUMANITARIAN EMERGENCY | 0 | 0 | 0 |
| SHARING AGREEMENT | 0 | 4 | 3 |
| REIMBURSABLE INSURANCE | 0 | 0 | 0 |
| CHAMPVA | 0 | 0 | 0 |
| EMPLOYEE | 0 | 0 | 0 |
| MARINE CORPS | 0 | 0 | 0 |
| AIR FORCE | 0 | 0 | 0 |
| COAST GUARD | 0 | 0 | 0 |
| COLLATERAL OF VET. | 0 | 0 | 0 |
| ----- | | | |
| Non-Veteran Sub-Total | 1 | 5 | 4 |
| | | | |
| CATEGORY OF VISIT | | | |
| SCHEDULED VISIT | 16 | 86 | 73 |
| UNSCHEDULED VISIT | 3 | 3 | 1 |
| 10 - 10 | 2 | 4 | 8 |
| ----- | | | |
| Category Sub-Total | 21 | 93 | 82 |
| ===== | | | |
| Total for NORTHERN: | 21 | 93 | 82 |
| Total: 196 | | | |
| | | | |
| Compensation and Pension appointments are included in the above categories and totals and are shown here for information only | | | |
| COMPENSATION AND PENSION | 0 | 0 | 0 |

Visit Rpt by Transmitted OPT Encounter**Example**

ENCOUNTER REPORT BY TRANSMISSION STATUS TO NPCDB
SOUTHERN DIVISION FOR PERIOD 11/01/96 THRU 11/25/96

| | ENCOUNTERS | | |
|---|------------|-------------|--------------|
| | WAITING | TRANSMITTED | ACKNOWLEDGED |
| ===== | | | |
| VETERAN ELIGIBILITY | | | |
| SERVICE CONNECTED 50% to 100% | 6 | 12 | 4 |
| AID & ATTENDANCE | 0 | 0 | 0 |
| SC LESS THAN 50% | 4 | 21 | 12 |
| NSC, VA PENSION | 0 | 19 | 0 |
| NSC | 0 | 0 | 0 |
| HOUSEBOUND | 0 | 0 | 0 |
| MEXICAN BORDER WAR | 0 | 0 | 0 |
| WORLD WAR I | 1 | 3 | 0 |
| PRISONER OF WAR | 0 | 0 | 4 |
| ----- | | | |
| Veteran Sub-Total | 11 | 55 | 20 |
| | | | |
| NON-VETERAN ELIGIBILITY | | | |
| OTHER FEDERAL AGENCY | 1 | 2 | 0 |
| ALLIED VETERAN | 0 | 0 | 0 |
| HUMANITARIAN EMERGENCY | 0 | 0 | 0 |
| SHARING AGREEMENT | 0 | 0 | 2 |
| REIMBURSABLE INSURANCE | 0 | 0 | 0 |
| CHAMPVA | 3 | 0 | 0 |
| EMPLOYEE | 0 | 4 | 0 |
| MARINE CORPS | 0 | 0 | 0 |
| AIR FORCE | 0 | 0 | 0 |
| COAST GUARD | 0 | 0 | 0 |
| COLLATERAL OF VET. | 0 | 0 | 0 |
| ----- | | | |
| Non-Veteran Sub-Total | 4 | 6 | 2 |
| | | | |
| CATEGORY OF VISIT | | | |
| SCHEDULED VISIT | 12 | 41 | 20 |
| UNSCHEDULED VISIT | 3 | 10 | 1 |
| 10 - 10 | 0 | 10 | 1 |
| ----- | | | |
| Category Sub-Total | 15 | 61 | 22 |
| ===== | | | |
| Total for SOUTHERN: | 15 | 61 | 22 |
| Total: 98 | | | |
| | | | |
| Compensation and Pension appointments are included in the above categories and totals and are shown here for information only | | | |
| COMPENSATION AND PENSION | 0 | 0 | 0 |

Visit Rpt by Transmitted OPT Encounter

Example

VISIT REPORT FOR ACTIVITY TRANSMITTED TO NPCDB
 Facility: ALBANY FOR PERIOD 11/01/96 THRU 11/25/96

NOTE This section consolidates all encounters into visits, where one visit is all encounters for a patient on a single day. For example, three encounters for a patient on one day, is one visit.

```

                                VISITS
=====
VETERAN ELIGIBILITY

SERVICE CONNECTED 50% to 100%      46
AID & ATTENDANCE                     9
SC LESS THAN 50%                    70
NSC, VA PENSION                     75
NSC                                  45
HOUSEBOUND                           0
MEXICAN BORDER WAR                  0
WORLD WAR I                         4
PRISONER OF WAR                     4
-----
Veteran Sub-Total                    253

NON-VETERAN ELIGIBILITY

OTHER FEDERAL AGENCY                 6
ALLIED VETERAN                      0
HUMANITARIAN EMERGENCY               0
SHARING AGREEMENT                   6
REIMBURSABLE INSURANCE               2
CHAMPVA                              4
EMPLOYEE                            0
MARINE CORPS                        0
AIR FORCE                            0
COAST GUARD                         0
COLLATERAL OF VET.                  0
-----
Non-Veteran Sub-Total                18

CATEGORY OF VISIT

SCHEDULED VISIT                      234
UNSCHEDULED VISIT                    16
10 - 10                             21
-----
Category Sub-Total                   271

Compensation and Pension appointments are included in the above
categories and totals and are shown here for information only

COMPENSATION AND PENSION              0
  
```

Workload Report

Introduction

The Workload Report option is used to generate a variety of reports showing clinic workload, facilitating determination of the kinds of activity within clinics during a specified date range. It allows for comparison of clinic or stop code activity for a specified time frame between the selected year and the previous year.

After the user specifies a date range for the report, the system will verify that the outpatient encounter status update process has been performed for each date in the range. If any of the dates have not been processed by this update logic, the user will be warned and generation of the workload report will be allowed to continue. However, the user will be advised to run the report again, after the update process has been completed (Appointment Status Update option, Supervisor Menu), to obtain more accurate workload data.

The user has the ability to sort the report by clinic or stop code and clinic. A brief or expanded report may be selected. A brief report only generates the comparison of selected clinics or stop codes between the selected year and previous year, showing number of visits for each year, net change, and change percentage. The expanded report includes the comparison (if desired) plus a summary of each clinic selected. Number of scheduled appointments, unscheduled appointments, inpatient appointments, and overbooks are some of the data elements displayed.

The user may choose to display the report for individual clinic meetings or a summary of the month. The patient names may/may not be displayed.

If the report is run by stop code, the add/edits may be included. Cancelled appointments will appear on this report if they were entered through either the Cancel Clinic Availability option or the Cancel Appointment option.

All appointments with a status of NO ACTION TAKEN will be included in the NO-SHOWS column of the report.

The total patients seen is calculated as follows.

Scheduled + Unscheduled + Inpatients + Overbooks
+ Add/Edits = Total Patients Seen

Depending on selected specifications, this report may be quite lengthy. You may choose to run the report during off hours.

Workload Report

Example

When actually printed, each clinic would appear on a separate page.

Example 1 - Brief Report, Totals by Clinic (Outpatient encounter status update procedure not completed)

**** Date Range Selection ****

Beginning DATE: **5-1-92** (MAY 01, 1992)

Ending DATE: **8-1-92** (AUG 01, 1992)

Will now check if outpatient encounter dates have been updated...

The outpatient encounter status update process has not completed for the following dates:

| | | |
|----------|----------|----------|
| 05/01/92 | 05/02/92 | 05/03/92 |
| 07/06/92 | 07/21/92 | 07/22/92 |
| 07/23/92 | | |

Note: To obtain accurate statistics, this workload report should be run again after the outpatient encounter status update process has been completed for these dates.

Totals by (C)LINIC or (S)TOP CODE?: C// **<RET>** CLINIC
 Select clinic: ALL// **UROLOGY**
 Select another clinic: **DERMATOLOGY**
 Select another clinic: **ORTHOPEDIC**
 Select another clinic: **<RET>**
 Brief or Expanded Report? E// **BRIEF**

DEVICE: HOME// **HALLWAY PRINTER** RIGHT MARGIN: 80// **132**
 DO YOU WANT YOUR OUTPUT QUEUED? NO// **<RET>**

CLINIC WORKLOAD REPORT

PAGE: 1
 COMPARISON OF VISITS TO PREVIOUS YEAR
 FOR PERIOD COVERING: 05/01/92-08/01/92
 REPORT RUN ON: 08/05/92@0908

| Clinic Name | # OF VISITS 05/01/92-08/01/92 | # OF VISITS 05/01/91-08/01/91 | NET CHANGE | % CHANGE |
|-------------|----------------------------------|----------------------------------|---------------|-------------|
| UROLOGY | 11 | 7 | 4.00 | 57.14 |
| DERMATOLOGY | 39 | 16 | 23.00 | 143.75 |
| ORTHOPEDIC | 15 | 4 | 11.00 | 275.00 |

Workload Report

Example

Example 2 - Expanded Report, Totals by Clinic (Outpatient encounter status update procedure completed)

Select division: ALL// **1** ALBANY 500
 Select another division: <RET>

**** Date Range Selection ****

Beginning DATE: **5-1-92** (MAY 01, 1992)

Ending DATE: **8-1-92** (AUG 01, 1992)

Will now check if outpatient encounter dates have been updated...everything looks ok.

Totals by (C)LINIC or (S)TOP CODE?: C// <RET> CLINIC
 Select clinic: ALL// **UROLOGY**
 Select another clinic: **DERMATOLOGY**
 Select another clinic: **ORTHOPEDIC**
 Select another clinic: <RET>
 Brief or Expanded Report? E// <RET> EXPANDED
 (D)ETAIL BY DAY or (S)UMMARY BY MONTH?: D// **SUMMARY BY MONTH**
 Do you want to compare this data to the same period in the previous year? NO// **Y** (YES)

Report will cover the period from: 05/01/92 through 08/01/92
 Comparison will be done against the same period for the previous year

DEVICE: HOME// **MAS PRINTER** RIGHT MARGIN: 80// **132**
 DO YOU WANT YOUR OUTPUT QUEUED? NO// <RET>

| CLINIC WORKLOAD REPORT | | | | | | | | | PAGE: 1 |
|------------------------------------|-------|-------------|-------------|-------------|--------------|------------|----------|--------------|---------------------|
| SUMMARY BY MONTH BY CLINIC | | | | | | | | | |
| PERIOD COVERING: 05/01/92-08/01/92 | | | | | | | | | |
| DATE RUN ON: 08/05/92@0908 | | | | | | | | | |
| CLINIC NAME | DATE | SCHED APPTS | UNSCH APPTS | INPAT APPTS | OVER - BOOKS | ADD/ EDITS | NO-SHOWS | CANCEL APPTS | TOTAL PATIENTS SEEN |
| UROLOGY | | | | | | | | | |
| | 05-92 | 8 | 0 | 0 | 0 | N/A | 1 | 0 | 8 |
| | 06-92 | 1 | 0 | 0 | 0 | N/A | 0 | 0 | 1 |
| | 07-92 | 2 | 0 | 0 | 0 | N/A | 0 | 0 | 2 |
| Clinic Total | | 11 | 0 | 0 | 0 | N/A | 0 | 0 | 11 |

Workload Report

Example

| CLINIC WORKLOAD REPORT | | | | | | | | | | PAGE: 2 |
|------------------------------------|-------|----------------|----------------|-----------------|----------------|---------------|--------------|-----------------|---------------------------|---------|
| SUMMARY BY MONTH BY CLINIC | | | | | | | | | | |
| PERIOD COVERING: 05/01/92-08/01/92 | | | | | | | | | | |
| DATE RUN ON: 08/05/92@0908 | | | | | | | | | | |
| CLINIC NAME | DATE | SCHED APPTS | UNSCH APPTS | INP AT APPTS | OVER- BOOKS | ADD/ EDITS | NO- SHOWS | CANCEL APPTS | TOTAL PATIENTS SEEN | |
| DERMATOLOGY | | | | | | | | | | |
| | 05-92 | 3 | 0 | 5 | 1 | N/A | 0 | 0 | 9 | |
| | 06-92 | 6 | 0 | 6 | 0 | N/A | 0 | 1 | 12 | |
| | 07-92 | 8 | 0 | 5 | 0 | N/A | 0 | 1 | 13 | |
| | 08-92 | 3 | 0 | 1 | 1 | N/A | 0 | 0 | 5 | |
| Clinic Total | | 20 | 0 | 17 | 2 | N/A | 0 | 2 | 39 | |

| CLINIC WORKLOAD REPORT | | | | | | | | | | PAGE: 3 |
|------------------------------------|-------|----------------|----------------|----------------|-----------------|---------------|--------------|-----------------|---------------------------|---------|
| SUMMARY BY MONTH BY CLINIC | | | | | | | | | | |
| PERIOD COVERING: 05/01/92-08/01/92 | | | | | | | | | | |
| DATE RUN ON: 08/05/92@0908 | | | | | | | | | | |
| CLINIC NAME | DATE | SCHED APPTS | UNSCH APPTS | INPAT APPTS | OVER - BOOKS | ADD/ EDITS | NO- SHOWS | CANCEL APPTS | TOTAL PATIENTS SEEN | |
| ORTHOPEDIC | | | | | | | | | | |
| | 05-92 | 2 | 0 | 3 | 0 | N/A | 0 | 0 | 5 | |
| | 06-92 | 1 | 0 | 1 | 0 | N/A | 0 | 0 | 2 | |
| | 07-92 | 3 | 0 | 3 | 0 | N/A | 0 | 2 | 7 | |
| | 08-92 | 0 | 0 | 0 | 1 | N/A | 0 | 0 | 1 | |
| Clinic Total | | 6 | 0 | 7 | 2 | N/ A | 0 | 2 | 15 | |

TOTAL PATIENTS SEEN = SCHED + UNSCHED + INPAT + OVERBOOKS + ADD/EDITS

CANCELLED APPTS AND NO-SHOWS ARE NOT INCLUDED IN THE ABOVE TOTALS AND ARE GIVEN FOR STATISTICAL PURPOSES ONLY.

| CLINIC WORKLOAD REPORT | | | | | | | | | | PAGE: 4 |
|--|-----------------------------------|--|------------------------------------|--|---------------|--|-------------|--|--|---------|
| COMPARISON OF VISITS TO PREVIOUS YEAR | | | | | | | | | | |
| FOR PERIOD COVERING: 05/01/92-08/01/92 | | | | | | | | | | |
| REPORT RUN ON: 08/05/92@0908 | | | | | | | | | | |
| Clinic Name | # OF VISITS 05/01/92 -08/01/92 | | # OF VISIT S 05/01/91 -08/01/91 | | NET CHANGE | | % CHANGE | | | |
| UROLOGY | 11 | | 7 | | 4.00 | | 57.14 | | | |
| DERMATOLOGY | 39 | | 16 | | 23.00 | | 143.75 | | | |
| ORTHOPEDIC | 15 | | 4 | | 11.00 | | 275.00 | | | |

Workload Report

Example

Example 3 - Expanded Report, Totals by Stop Code (Outpatient encounter status update procedure completed)

**** Date Range Selection ****

Beginning DATE: **10 1 92** (Oct 1, 1992)

Ending DATE: **12 31 92** (DEC 31, 1992)

Will now check if outpatient encounter dates have been updated... everything looks ok.

Totals by (C)LINIC or (S)TOP CODE?: C// **STOP CODE**

Enter Stop Code: ALL// **<RET>**

Do you want to include add/edits? NO// **<RET>** (NO)

Brief or Expanded Report? E// **<RET>** EXPANDED

(D)ETAIL BY DAY or (S)UMMARY BY MONTH?: D// **<RET>** DETAIL BY DAY

Do you want to see patient names? NO// **<RET>** (NO)

Do you want to compare this data to the same period in the previous year? NO// **Y** (YES)

Report will cover the period from: 10/01/92 through 12/31/92

Comparison will be done against the same period for the previous year

DEVICE: HOME// **MAS PRINTER** RIGHT MARGIN: 80// **132**

DO YOU WANT YOUR OUTPUT QUEUED? NO// **<RET>**

| CLINIC WORKLOAD REPORT | | | | | | | | | PAGE: 1 |
|------------------------------------|----------|----------------|----------------|----------------|----------------|---------------|--------------|-----------------|---------------------------|
| DETAILED BY DAY BY STOP CODE | | | | | | | | | |
| PERIOD COVERING: 10/01/92-12/31/92 | | | | | | | | | |
| DATE RUN ON: 08/15/92@0908 | | | | | | | | | |
| CLINIC NAME | DATE | SCHED APPTS | UNSCH APPTS | INPAT APPTS | OVER- BOOKS | ADD/ EDITS | NO- SHOWS | CANCEL APPTS | TOTAL PATIENTS SEEN |
| STOP CODE: 301 | | | | | | | | | |
| UROLOGY | | | | | | | | | |
| | 10-06-92 | 0 | 0 | 1 | 0 | N/A | 0 | 0 | 1 |
| | 11-03-92 | 0 | 0 | 1 | 0 | N/A | 0 | 0 | 1 |
| Clinic Total | | 0 | 0 | 2 | 0 | N/A | 0 | 0 | 2 |
| Stop Code 301 Total | | 0 | 0 | 2 | 0 | 0 | 0 | 0 | 2 |

Workload Report

Example

| CLINIC WORKLOAD REPORT | | | | | | | | | PAGE: 2 |
|------------------------------------|----------|----------------|----------------|----------------|-----------------|---------------|--------------|-----------------|---------------------------|
| DETAILED BY DAY BY STOP CODE | | | | | | | | | |
| PERIOD COVERING: 10/01/92-12/31/92 | | | | | | | | | |
| DATE RUN ON: 08/15/92@0908 | | | | | | | | | |
| CLINIC NAME | DATE | SCHED APPTS | UNSCH APPTS | INPAT APPTS | OVE R- BOOKS | ADD/ EDITS | NO- SHOWS | CANCEL APPTS | TOTAL PATIENTS SEEN |
| STOP CODE: DERMATOLOGY | 304 | | | | | | | | |
| | 10-02-92 | 1 | 0 | 0 | 0 | N/A | 0 | 0 | 1 |
| Clinic Total | | 1 | 0 | 0 | 0 | N/A | 0 | 0 | 1 |
| Stop Code 304 Total | | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 1 |

| CLINIC WORKLOAD REPORT | | | | | | | | | PAGE: 3 |
|------------------------------------|----------|----------------|----------------|----------------|-----------------|---------------|--------------|-----------------|---------------------------|
| DETAILED BY DAY BY STOP CODE | | | | | | | | | |
| PERIOD COVERING: 10/01/92-12/31/92 | | | | | | | | | |
| DATE RUN ON: 08/15/92@0908 | | | | | | | | | |
| CLINIC NAME | DATE | SCHED APPTS | UNSCH APPTS | INPAT APPTS | OVER - BOOKS | ADD/ EDITS | NO- SHOWS | CANCEL APPTS | TOTAL PATIENTS SEEN |
| STOP CODE: NEURO | 401 | | | | | | | | |
| | 12-07-92 | 0 | 0 | 1 | 0 | N/A | 0 | 0 | 1 |
| Clinic Total | | 0 | 0 | 1 | 0 | N/A | 0 | 0 | 1 |
| Stop Code 401 Total | | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 1 |

TOTAL PATIENTS SEEN = SCHED + UNSCHED + INPAT + OVERBOOKS + ADD/EDITS
 CANCELLED APPTS AND NO-SHOWS ARE NOT INCLUDED IN THE ABOVE TOTALS AND
 ARE GIVEN FOR STATISTICAL PURPOSES ONLY.

Workload Report

Example

CLINIC WORKLOAD REPORT
 COMPARISON OF VISITS TO PREVIOUS YEAR
 FOR PERIOD COVERING: 10/01/92-12/31/92
 REPORT RUN ON: 08/15/92@0908

PAGE: 4

| Stop Code Name | # OF VISITS 10/01/92-12/31/92 | # OF VISITS 10/01/91-12/31/91 | NET CHANGE | % CHANGE |
|----------------|----------------------------------|----------------------------------|---------------|-------------|
| 301 | 2 | 0 | 2.00 | N/A |
| 304 | 1 | 3 | -2.00 | -66.67 |
| 316 | 0 | 9 | -9.00 | -100.00 |
| 401 | 1 | 0 | 1.00 | N/A |

Index

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